

Project[®] 2013

ABSOLUTE BEGINNER'S GUIDE

No experience necessary!



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Brian Kennemer and Sonia Atchison

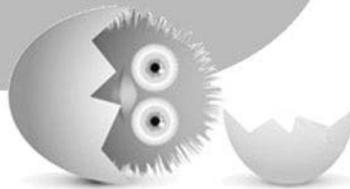
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Project[®] 2013

**ABSOLUTE
BEGINNER'S
GUIDE**



Brian Kennemer and Sonia Atchison

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800 East 96th Street,
Indianapolis, Indiana 46240

Project 2013 Absolute Beginner's Guide

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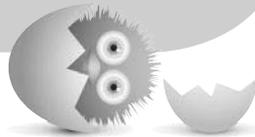
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- How this book is organized
- Conventions used in this book

INTRODUCTION



Project management is a broad term that can mean something very formal and specific to one person but something very organic and pieced-together to another. The fact of the matter is that “pieced-together” can only get you so far. Spreadsheets, sticky notes, and email are all great tools, and they may work fine for your smaller projects. However, once you start adding just a few more people to a project, or just one or two more reports to generate for upper management, the blood pressure goes up a smidge. Gathering bits and pieces from the various tools you’ve been using to track your projects gets to be more tedious than you may have time for.

Microsoft Project 2013 addresses these issues gracefully and powerfully. I can’t lie: it has a steep learning curve, but it’s absolutely worth your time to figure it out, even at a rudimentary level. The amount of time it will ultimately save you is reason enough, and as you complete projects, you can review the project data to help make decisions about future projects. It’s a thing of beauty, really, especially if you’ve been used to a lot of manual updating and high-maintenance project and resource tracking.

Project 2013 is versatile enough to help bring order to a novice project manager’s plans while offering rich solutions for experienced project managers. The experienced user will

benefit from things such as earned value and critical path analysis, resource leveling, and heavy customizability to meet organizational needs while the product also provides the simple, easy-to-use features to manage even the smallest efforts.

How This Book Is Organized

This book introduces you to Project 2013. It is designed to familiarize you with project management terminology, as it is used in Project 2013, and covers functionality that was brought forward from earlier versions of Project, as well as features that are new in Project 2013. This book is far from a be-all end-all reference book for Project 2013. Instead, it focuses on introducing the concepts and procedures that are most commonly used. *Project 2013 Absolute Beginner's Guide* does the following:

- It goes over some high-level project management theory as it applies to Project 2013.
- It introduces features that are new in this version.
- It orients you to Project 2013, including the different parts of the Project window and the many views available to you.
- It walks you through the process of creating a project, from adding tasks and assigning resources, to tracking costs and reporting on progress.
- It touches on some simple customization options, as a starting point for more advanced topics.
- It offers some solutions to commonly encountered project issues.

Conventions Used in This Book

Here's a quick look at a few structural features designed to help you get the most out of this book.



TIP A *tip* is a piece of advice—a little trick, actually—that helps you more effectively maneuver around problems or limitations.



NOTE A *note* is designed to provide information that is generally useful but not specifically necessary for what you're doing at the moment. Some are like extended tips—interesting, but not essential.



CAUTION A *caution* tells you to beware of a potentially dangerous act or situation. In some cases, ignoring a caution could cause you significant problems—so pay attention to them!

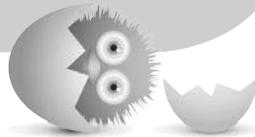
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IN THIS CHAPTER

- Starting a new blank project
- Starting projects from templates or other file formats
- Setting options for new projects
- Saving your project
- Setting up calendars

3



STARTING A PROJECT

This chapter covers how to create and save new projects and the basic options that control how your project is scheduled. You will also learn how to set up the calendars that Project 2013 uses to schedule your project work.

The process of creating a project in Project 2013 begins before work is done on any part of a project, before the project schedule is set, and before tasks are even identified. Creating a new project in Project 2013 means simply setting up the framework for the project plan and making some decisions about how the project will be carried out, when people will be working on it, and what factors matter most while work is being done on the project.

More often than not, the building of a project schedule is a team effort, with you as the project manager or scheduler being the person who builds the actual file in Project. Input from your project team is essential at several different points. You may be able to get the list of tasks started by yourself, but to get the complete list of detailed tasks you will likely need help from

your team. The same goes for creating the links between the tasks, the duration and work estimates, and maybe even the resource assignments. On some projects, your relationship to the work might allow you to do all of this on your own; even so, make sure that you leave yourself open to the team approach. On larger or more complex projects, assume that this is an iterative and team-based process.

Setting Up a Project

The first step to starting a project in Project 2013 is simply opening up Project 2013 and choosing where to save it.

Creating a New Project

Open Project 2013 and you will see a screen that displays a list of recently accessed files on the left side and then several options for creating a project on the right side. Figure 3.1 shows this screen.

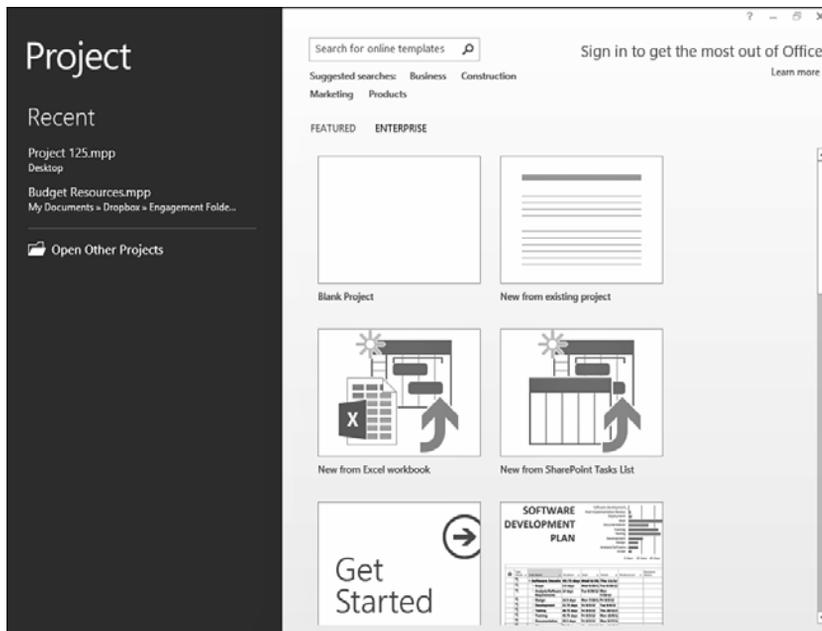


FIGURE 3.1

The Project Open screen provides you quick options for creating new projects or opening existing projects.



NOTE If you are using Project Professional 2013 and want to save your new project to Project Server, be sure that you are connected to your Project Server instance before creating your new project. If you're not sure how to connect to Project Server, contact your organization's site administrator.

To create a new project, complete these steps:

1. After Project is open, click the **File** tab, and then click **New** on the left side of the Project window.
2. Choose how you want to create your new project:
 - **Blank project:** This is just like it sounds. It will create a new blank project. Click this option, and then click **Create** on the right portion of the window to create a new project from scratch.
 - **New from existing project:** This option enables you to use an existing project you have already created as a template to create your new project. Click this option, navigate to where you have the existing project you want to use, and then click **Open**.
 - **New from Excel workbook:** If you have a task list already built in Excel and you want to start your project using that list, this is your option. Click this option, locate and click an Excel workbook, and then click **Open** to create a new project using data stored in the selected workbook. A wizard walks you through the data-import process where you map your task list fields to the correct fields in Project 2013.
 - **New from SharePoint task list:** Here you can use a SharePoint task list as the starting point for your project. Click this option, provide a URL for an existing SharePoint site, choose a task list from that site, and then click **OK** to create a new project using data from that list.
 - **Office.com Templates:** At the top of the New page is a search box where you can search Office.com and its database of templates. There will also be a few commonly used templates listed as links directly on the New page.

Saving a Project

With your new project created, the next step is to decide where you want to save it. If you are using Project Professional 2013 and Project Server, you have several options for saving your project. Professional allows you to save to Project Server 2013, but you can also save your project to SharePoint in a way where it creates a new tasks list. It then keeps your project in sync with the SharePoint list. Project 2013 (both versions) also allows you to save your project as an MPP file directly to

a SharePoint document library or to a Windows Live SkyDrive. This section covers the various save options (see Figure 3.2).

Saving your project to a SharePoint document library is the same as saving it to a network drive. Your project is saved as an MPP file. However, syncing your project to a SharePoint site is different. It saves the MPP file to a document library on the SharePoint site, but it also creates a new Tasks List on the site and creates a new task in this list for each task in your project. This tasks list can then be used by you and your team.

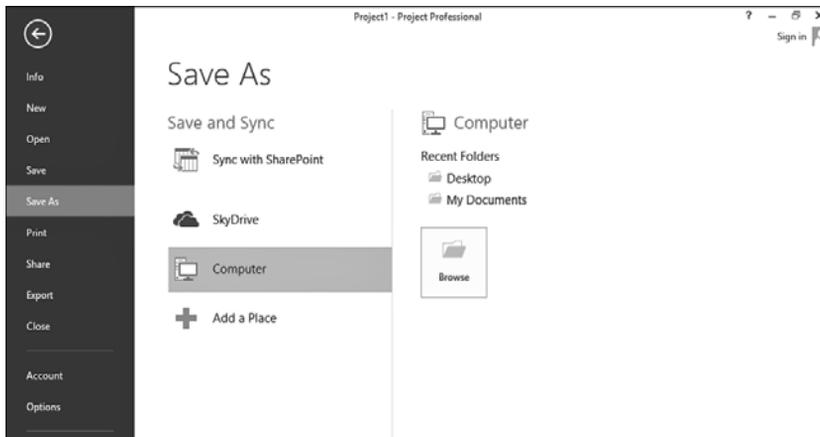


FIGURE 3.2

The Save As page provides you easy access to a variety of options for saving your project.

Saving Your Project as an MPP File

1. Click the **File** tab, and then click **Save** on the left side of the Project window.
2. Pick a location where you want to save your project:
 - **Computer:** Click **Computer** to save your project as an MPP file to a location on your local machine or a network drive.
 - **SkyDrive:** Click **SkyDrive** to save your project to a Windows Live SkyDrive location. If this is the first time, you will be prompted to provide your Windows Live account information to access your SkyDrive folders
 - **SharePoint:** To save your project to a SharePoint document library that is not already listed, click **Other Web Locations** and provide the URL to your SharePoint library. If your library is in Office 365, click **Add a Place** and select **Office 365 SharePoint**. If you have already added your SharePoint site previously, it will be listed in the Save page already.

3. Provide a filename and location for your project.
4. Click **Save**.

Syncing Your Project with SharePoint

1. Click the **File** tab, and then click **Save** on the left side of the Project window.
2. Click **Sync with SharePoint**.
3. Either choose to create a new site or select to use an existing site.
4. If you selected to sync with an existing SharePoint site, provide the URL, and then click **Verify Site**. Then provide a tasks list name for your project (see Figure 3.3).
5. If you selected to create a **New SharePoint Site**, provide a name for the site and a URL for the SharePoint server.
6. Click **Save**.

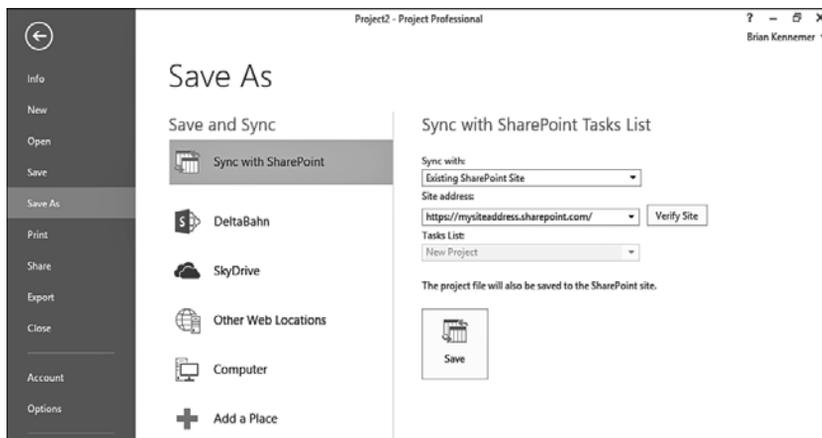
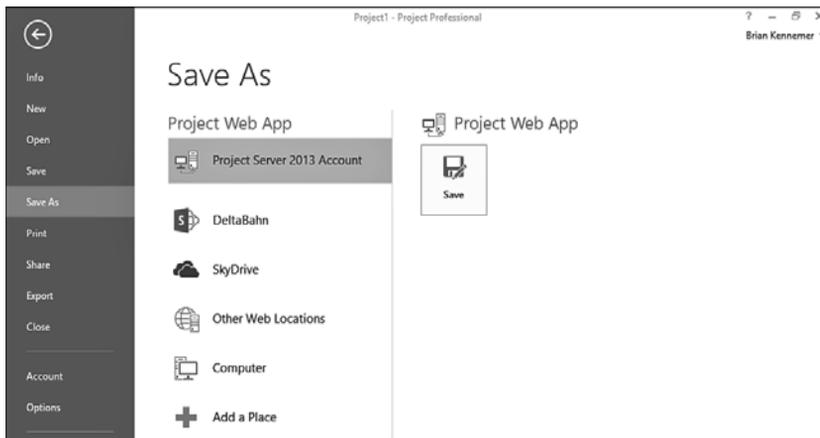


FIGURE 3.3

Syncing your project to a SharePoint tasks list is super easy.

Saving Your Project to Project Server

If you are using Project Professional 2013 and you have connected to your organizational Project Server 2013 server, your Save As page will look slightly different. Instead of the **Sync with SharePoint** option at the top of the page, it will have a **Project Web App** section and the name of your Project Server 2013 account connection, as shown in Figure 3.4.

**FIGURE 3.4**

The Save As page when connected to Project Server 2013 using Project Professional.

1. Click the **File** tab, and then click **Save** on the left side of the Project window.

By default, the Project Server account you connected to when you opened Project 2013 will be selected.

2. Click **Save**.
3. Enter a name for your project in the **Name** field.

You have the option of selecting a calendar. If your organization uses departments, you also have the option to select a department. Contact your Project Server administrator for more information.

4. Enter values for the custom fields as needed.
5. Click **Save**.

With your project saved to Project Server, you should consider two more project actions:

- **Publish your project:** Every time you save your project to Project Server, your changes are saved, but they will not be visible to other users of Project Server in reports or in timesheets until you publish your project. To publish the project, click the **File** tab, and then click **Publish**.
- **Check your project in:** When you finish editing and close your project, you are prompted to check in your project. Other users (with the appropriate permissions) can open your project for editing only if you have it checked in. If you do not check the project in, users are blocked from opening your project in Read\Write mode until you have checked it in. To check your project in,

click the **File** tab, and then click **Close**. When prompted, click the option to **Check In** the project.

Setting Project Properties and Options

You can set a lot of different options and defaults for your project. And by a *lot*, I mean way too many to cover in a reasonable way when you're just getting started with your project. I do, however, point you to the ones that are the most important and the most commonly used at this point in your project. I then cover other options in later sections of this book.

Setting Project Properties

First, let's look at setting project properties. These properties are a place to store metadata about your project such as title, subject, author, company, keywords, and descriptions of your project. These properties can be useful when searching for your project or for reference purposes when you or someone else revisits this project file months or years from now. To set these properties, complete these steps:

1. Click the **File** tab, and then, with **Info** selected on the left side of the Project window, click **Project Information** on the right side of the window.
2. Click **Advanced Properties**.
3. On the **Summary** tab, provide whatever data is most appropriate in your organization. You can choose to include a **Title**, **Subject**, **Author**, **Manager**, **Company**, and other relevant metadata for your project.
4. On the **Custom** tab, you can include additional project properties by choosing a property **Name**, the data **Type** for the property, and the **Value** for the property. When all three of these fields are completed, click **Add** to add the property to your project.

Setting Project Options

Next, let's look at the default settings and other options you want to use for your project plan. Again, I can't emphasize enough that there are significantly more options than what I cover in this book, but this procedure highlights the most common options that you'll want to set at this point in your planning process:

1. Click the **File** tab, and then click **Options**.
2. Click **Schedule** on the left side of the **Project Options** dialog box.

3. If appropriate, choose the **Calendar options for this project**, including what day the **Week starts on**, which month the **Fiscal year starts in**, what the **Default start time** and **Default end time** are for a typical work day, and how many **Hours per day**, **Hours per week**, and **Days per month** your project's resources typically work. Figure 3.5 shows the **Calendar options for this project** section.
 - **Default start and end times:** Set these values to the normal working day that will be in place for your project. The default is 8 a.m. and 5 p.m.
 - **Hours per day and Hours per week:** Normally, this should be equal to the number of working hours in the default working day and working week as defined in the project calendar. We revisit this when we talk about working calendars later in this chapter. The default is 8 hours per day and 40 hours per week. If your project team will work 7 hour days 5 days a week, you need to change these to 7 and 35. Then the project calendar should be changed to agree with this working time.
 - **Days per month:** This is the average number of working days in a month. The default is 20.



NOTE The hours per day/month and days per month are really conversion settings that Project uses if you enter certain units of measure. For example, if you entered 1 Month as the duration for a task, Project uses the **Days per month** setting to calculate the number of days for that 1 month of duration. Likewise, if you enter 1 week, Project uses the **Hours per week** and **Hours per day** settings to figure out how many days/hours.

4. In the **Scheduling options for this project** section, shown in Figure 3.5, choose whichever settings are most appropriate for your project. Here are some highlights:
 - **New tasks created:** Choose whether you want new tasks in your project to be **Auto Scheduled**, using the Project scheduling engine, or **Manually Scheduled**, using only the dates you enter. You can change this setting for each task individually. What you choose here sets what the default is for each new task in your project. In general, I suggest using **Auto Scheduled** as the default.
 - **Duration is entered in:** Choose the time units you want to use, by default, when identifying the length of time you think tasks in your project will take (also known as *duration*). You can choose **Minutes**, **Hours**, **Days**, **Weeks**, or **Months**. You can choose any of these time units at any time when entering task durations. Here, you're setting what the default is for each new task in

your project. I suggest keeping the default of **Days** unless your organization is really married to the idea of using another unit.

- **Work is entered in:** Choose the time units you want to use, by default, when entering the work completed on tasks in your project. As with duration, you can choose **Minutes, Hours, Days, Weeks, or Months**. Again, here I suggest sticking with the default of **Hours**.
 - **Other options:** There are many more options in the **Project Options** dialog, to be sure, and we cover some of them later in this book. At this point, keep the defaults.
5. Click **OK** to save these settings for your project.

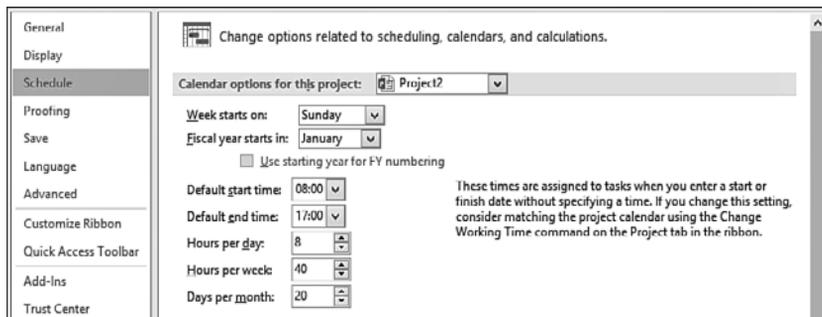


FIGURE 3.5

Set calendar options under *Schedule* on the *Project Options* dialog box.

Choosing a Project Start or Finish Date

Within Project 2013, you can schedule a project either from a specified start date forward to the projected finish date or you can schedule it from a specified finish date backward to a projected start date. Most projects are deadline driven, meaning that we know about when we need to have them finished. Because of this, it might seem intuitive for a newcomer to Project 2013 to schedule a project from the finish date. I urge you to resist the temptation to do this with your project. It seems like a great idea in theory, but scheduling a project back from the finish date should be done only by the most advanced of users because of the way it makes the scheduling features of Project react to changes. For the newcomer, all projects should be scheduled from the start date.

To set a start or finish date for your project, complete these steps:

1. On the **Project** tab of the ribbon, in the **Properties** group, click **Project Information**.

2. Click the **Schedule from** box, and then choose whether you want to schedule your project from the **Project Start Date** or the **Project Finish Date**. Again, I urge you to schedule your project from the **Project Start Date**.
3. Choose a project **Start date** or **Finish date**, as shown in Figure 3.6.

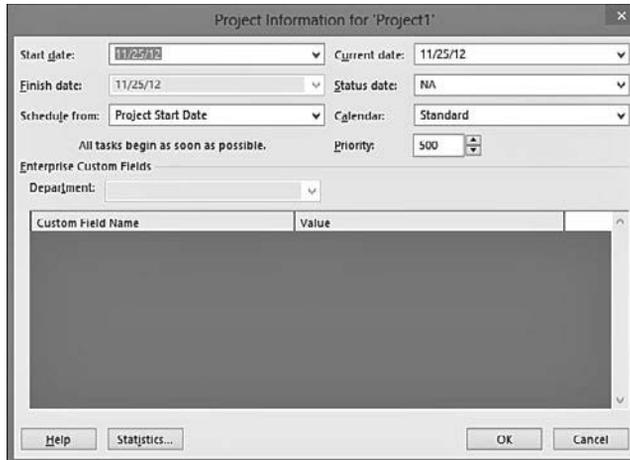


FIGURE 3.6

The Project Information dialog is where you set the Schedule From setting and several other project settings.

4. Click **OK** to save the date you selected.

Setting Up Your Project's Calendars

Project 2013 uses calendars that identify working times to determine when resources in your organization are likely available to work on tasks in your project.

There are four types of calendars:

- **Base calendars:** Project uses base calendars as a starting point for creating the other three types of calendars (project, task, and resource calendars). You can think of them as templates upon which other calendars are based. Use base calendars to enter things like holidays, typical working hours, or other organization-wide calendar items. When you enter a holiday or a change to working times in a base calendar, those changes are automatically reflected in all other calendars that use that base calendar
- **Project calendars:** The project calendar sets the default working times for all tasks in your project. For example, if most of the work on your project

happens between 8 a.m. and 5 p.m. Monday through Friday, the out-of-the-box Standard calendar is the best choice for your project calendar.

- **Resource calendars:** Use resource calendars to track the schedules of individual resources. For example, if a resource has a flexible work arrangement and works four 10-hour days instead of five 8-hour days, you can set that resource's calendar to reflect that schedule without changing the overall schedule for all other resources in the organization.
- **Task calendars:** Task calendars are not often used by newcomers to Project, but they can be very powerful. Use task calendars to enter special days specific to individual tasks in your project. For example, if the task must happen over a weekend but your project calendar specifies weekends as nonworking time, you can use a task calendar to call out that weekend as working time for just that task while leaving the rest of the project using the normal project calendar.



NOTE The following sections talk about base and project calendars. For more information on task and resource calendars, see Chapter 4, "Working with Tasks," and Chapter 5, "Working with Resources."

Modifying an Existing Base Calendar

Project comes with three base calendars already configured:

- **Standard:** 8 a.m. to 5 p.m. weekdays, with a 1-hour lunch break
- **24 Hours:** 8 a.m. to 4 p.m., 4 p.m. to 12 a.m., and 12 a.m. to 8 a.m., continuously, with no breaks
- **Night Shift:** 11 p.m. to 8 a.m. weekdays, with a 1-hour break

You can modify these base calendars to meet your organization's needs.



NOTE If you are using Project Professional 2013 with Project Server, your Project Server administrator may have the server set up to *not* allow you to specify your own base calendars. Check with your administrator to find out about the calendar settings for your Project Server.

To choose which base calendar you want to modify, complete these steps:

1. On the **Project** tab, in the **Properties** group, click **Change Working Time**.
2. Click the **For calendar** list, and then click the base calendar you want to modify.

- Review the working times displayed on the right portion of the **Change Working Time** dialog box. Click a day on the calendar to review its working times, as shown in Figure 3.7.

**FIGURE 3.7**

Working times are displayed for the selected calendar day.

While on the **Change Working Time** dialog box, you can make several different kinds of changes to the selected base calendar.

Changing a Working Day to a Nonworking Day

To change a working day to a nonworking day (for example, to add a company holiday), complete these steps:

- Click the day of the holiday in the calendar.
- Type the name of the holiday in the **Name** column on the **Exceptions** tab, and then press **Tab**. By default, the **Start** and **Finish** fields for the exception are set to the days you have selected in the calendar control at the top of the dialog. If those are not the dates you want, you can enter the desired dates.
- Double-click the holiday, and then click **Nonworking** on the **Details** dialog box.
- If the holiday is observed on a regular basis, you can set a **Recurrence pattern** and **Range of recurrence**.
- Click **OK** to add the holiday to the selected base calendar.

Changing a Nonworking Day to a Working Day

To change a nonworking day to a working day (for example, for an event occurring over a weekend), complete these steps:

- Click the day of the event in the calendar.

2. Type the name of the event in the **Name** column on the **Exceptions** tab, and then press **Tab**. By default, the **Start** and **Finish** fields for the exception are set to the days you have selected in the calendar control at the top of the dialog. If those are not the dates you want, you can enter the desired dates.
3. Double-click the event, and then click **Working times** on the **Details** dialog box.
4. Select the **Working times** radio button at the top of the **Details** dialog.
5. Use the **From** and **To** columns to define the working hours for the event (see Figure 3.8).
6. If the event is scheduled on a regular basis, you can set a **Recurrence pattern** and **Range of recurrence**.
7. Click **OK** to add the event to the selected base calendar.



FIGURE 3.8

Set the working times for your new working day.

Changing Default Working Times

To change the default working times for the base calendar, complete these steps:

1. Click the **Work Weeks** tab, and then double-click **[Default]**.
2. Click a day of the week in the **Select day(s)** box, or use **Ctrl-click** or **Shift-click** to select multiple days, and then choose which option you want to use for scheduling on the selected days:

- **Use Project default times for these days:** Click this to use the calendar options from the **Project Options** dialog box to define the working times on the selected days.
 - **Set days to nonworking time:** Click this to identify the selected days as planned days off.
 - **Set day(s) to these specific working times:** Click this and use the **From** and **To** columns to identify the working times for the selected days.
3. Click **OK** to change the default working times for the selected base calendar.

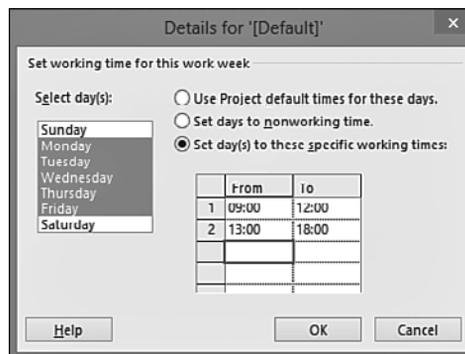


FIGURE 3.9

Change the default working times for your base calendar.

Changing Working Times for a Specific Time Period

You may have specific weeks when the working times need to be different from the default working times. For example, if your organization has a week-long training session that limits the amount of project time to half-days for that week, you can include the schedule changes for that week in the base calendar.

To change the working times for a specific time period in the base calendar, complete these steps:

1. Click the **Work Weeks** tab, and then type a name for the changed period of working time in the **Name** column.
2. Choose the start time for the changed period in the **Start** column, and then choose the finish time in the **Finish** column.
3. Double-click the row you just created to bring up the **Details** dialog box.

4. Click a day of the week in the **Select day(s)** box, or use **Ctrl-click** or **Shift-click** to select multiple days, and then choose which option you want to use for scheduling on the selected days:
 - **Use Project default times for these days:** Click this to use the calendar options from the **Project Options** dialog box to define the working times on the selected days.
 - **Set days to nonworking time:** Click this to identify the selected days as planned days off.
 - **Set day(s) to these specific working times:** Click this and use the **From** and **To** columns to identify the working times for the selected days.
5. Click **OK** to add the changed working times to the selected base calendar.

Creating a New Base Calendar

If none of the default base calendars meet your needs, you can create a new base calendar to use as a starting point for the project, task, and resource calendars.



NOTE As mentioned previously, if you are using Project 2013 connected to Project Server 2013, your Project Server administrator may have the server configured so that you do not have the ability to add new base calendars.

To create a new base calendar, complete these steps:

1. On the **Project** tab, in the **Properties** group, click **Change Working Time**.
2. Click **Create New Calendar**.
3. Choose how you want to create the calendar:
 - **Create a new base calendar:** Click this to create a new calendar from scratch. Working times are set to the calendar options from the **Project Options** dialog box, by default.
 - **Make a copy of [existing base] calendar:** Click this to use an existing base calendar as a starting point for your new base calendar. Use the drop-down list to choose which base calendar you want to copy. This option can save you a ton of time if an existing calendar already has most of the settings you need.
4. Type a name for your new base calendar in the **Name** box.
5. Click **OK** to create your new base calendar.

Use the steps in the previous section, “Modify an Existing Base Calendar,” to do the following:

- Change a working day to a nonworking day
- Change a nonworking day to a working day
- Change the default working times for the new base calendar
- Change the working times for a specific time period in the new base calendar

Setting Up Your Project's Calendar

When setting up your project's calendar, you need to decide which base calendar you want to use as a starting point. If most of your tasks need to be completed during normal working hours, choose the **Standard** base calendar. If most of your tasks need to be completed during off hours, the **Night Shift** base calendar may make more sense for your project. Or, if your project needs continuous coverage, choose the **24 Hours** base calendar.



NOTE If you are using Project Professional 2013 with Project Server, the project calendar can be modified only by someone with appropriate permissions. If you need to change the working times in your project, consider modifying the task or resource calendars, as described in Chapters 4 and 5.

Remember that when you set the project calendar you are simply choosing what the default working times will be for tasks and resources in your project. You can modify working times for individual tasks and resources to reflect exceptions to the default hours.

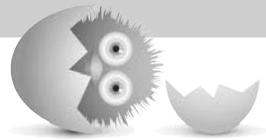
To set your project's calendar, complete these steps:

1. On the **Project** tab of the ribbon, in the **Properties** group, click **Project Information**.
2. Click **Calendar** and choose the base calendar that you want to use for your project.
3. Click **OK**.
4. On the **Project** tab, in the **Properties** group, click **Change Working Time**.
5. Ensure that the base calendar you selected in step 2 is displayed in the **For calendar** list.
6. Review the working times displayed on the right portion of the **Change Working Time** dialog box. Click a day on the calendar to review its working times.

7. Use the steps in the “Modify an Existing Base Calendar” section to do the following:
 - Change a working day to a nonworking day
 - Change a nonworking day to a working day
 - Change the default working times for the project calendar
 - Change the working times for a specific time period in the project calendar
8. Click **OK** to save your changes.

THE ABSOLUTE MINIMUM

Whether you created your project from a blank slate or by using a template, Project 2013 offers several options for scheduling your project. Take some time to understand these options now so that you don't have trouble later on.



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